

The First Five Years of Advancing Wellness: A Midpoint Assessment

Executive Summary

Prepared by Informing Change

Prepared for The California Wellness Foundation

Beginning in 2014, Cal Wellness embarked on a decade-long grantmaking approach called Advancing Wellness. In keeping with the foundation's broad definition of wellness and focus on health equity, Advancing Wellness includes four major portfolio areas: Health Care, Education and Employment, Healthy and Safe Neighborhoods, and Health Policy and Strengthening the Sector.

In 2019, the California Wellness Foundation partnered with Informing Change to conduct a midpoint assessment of the Advancing Wellness strategy. As a mechanism for helping the foundation think through the next five years of Advancing Wellness, this midpoint assessment analyzes and reports feedback on the approach from a variety of stakeholders including grantees, board and staff members, and external health experts in California. Changes that grantees and others reported have helped us to identify areas of improvement and promise in Advancing Wellness strategies and tactics. This executive summary abridges findings and key recommendations from the full report, which also includes reflections, additional recommendations, and a full description of our methods and data sources.

Cal Wellness' Definition of Health Equity

Health equity means that every person has the opportunity to achieve optimal health regardless of their race, ethnicity, education level, gender identity, sexual orientation, employment, neighborhood, or disability. We recognize that the limited political, social, and economic power held by disenfranchised communities has led to significant health inequities. We want to address root causes of these inequities to help communities build fulfilling, healthy lives.



Since its founding in 1992, The California Wellness Foundation (Cal Wellness, the foundation) has worked toward a California where every resident enjoys good health and experiences wellness. To do this, the foundation aims to protect and improve the health and wellness of all Californians by increasing access to health care, quality education, good jobs, healthy environments, and safe neighborhoods.



Informing Change is a Berkeley-based consulting firm dedicated to driving positive social change through strategic learning. We believe that knowledge is power, and, in working with nonprofit and philanthropic partners, we use data-driven insight to build and share that power with those working to uphold the rights of all, enabling communities to thrive, and ensuring that we all have opportunities to reach our full potential.

Key Findings and Recommendations

Advancing Wellness has thus far resulted in changes in social determinants of health that improve community wellness as well as those that strengthen the capacities and sustainability of grantee organizations. Cal Wellness' approach to its work, including its tactics of providing unrestricted, multi-year funding, relationship-building with grantees, and using the foundation's voice in solidarity with grantees on issues of mutual concern, is as much responsible for these results as the investment of funds itself.

Our assessment also included opportunities to consider the next five years of Advancing Wellness. A continued, deliberate focus on diversity, equity, and inclusion (DEI) and opportunities to support collaboration between grantees where it organically emerges are two of the most significant opportunities that we surfaced.

CHANGES CONNECTED TO ADVANCING WELLNESS

Changes for Grantees and Communities

Advancing Wellness grants result in real change in the social determinants of health for individuals and communities, thanks to the organizations making the work happen. Using a framework called the change matrix, we charted grantees' reported changes to four quadrants: outcomes in individual awareness and behaviors; individuals' access to resources and opportunities; social norms, beliefs, and practices; and laws and policies.¹ We observed near-equal concentrations of individual and systemic outcomes, likely a result of Advancing Wellness' dual focus on direct service and advocacy. Further, many outcomes that grantees reported relate to more than one quadrant in the change matrix, highlighting the multiple dimensions of change that Cal Wellness grantees have achieved.

Changes in Organizations' Capacity, Contributions, and Sustainability

Because of their Advancing Wellness grants, grantees were able to make internal improvements, whether by investing in infrastructure or in staffing functions such as human resources, development, and communications. Grantees described how investments in new and additional staff expanded their ability to provide services, engage community members, execute core organizational functions, and build and sustain more effective organizational cultures.

Changes Resulting from Leadership Support and Staff Development

Recipients of all kinds of Advancing Wellness grants reported stronger leadership outcomes, but sabbatical grant recipients unanimously reported outcomes related to stronger leadership and staff development. In the words of one grantee, "[The Advancing Wellness sabbatical grant] gives leaders a chance to breathe and their teams an opportunity to shine." Grants for leadership and staff development helped prevent staff burnout and build organizational resilience, a focus that cross-cuts all of Advancing Wellness' goals.

Key Recommendations

- Continue to make grants that align with a theory of change that improving social determinants of health requires mutually reinforcing investments related to the multiple health and wellness issues reflected in Advancing Wellness' portfolios.
- Continue to support organizations doing policy advocacy, direct service, and the combination of the two.

¹ The Change Matrix is based on the Gender at Work Framework, originally developed by Aruna Rao and David Kelleher (2002) and adapted by Srilatha Batliwala (2008): <https://genderatwork.org/analytical-framework/>.

- Continue to support organizational leaders through capacity grants and sabbaticals, and consider leadership investments that fall outside of the traditional executive director/CEO positions.

CAL WELLNESS' TACTICS FOR RESPONSIVENESS

The changes achieved by Advancing Wellness grantees result not only from the funding invested but from the way in which Cal Wellness makes its grants.

Flexible, Multi-year Funding

The provision of multi-year, flexible funding, a core strategy of Advancing Wellness, has enabled grantees to be responsive to their own communities and stakeholders. For many grantees, an unrestricted grant was the starting point for changes rippling out to individuals and the community, such as hiring more staff to broaden access to their programs. We saw evidence across our data sources that core operating support, and especially consistent and sustained funding over long periods of time, ensured that organizations remained stable while enabling them to respond quickly to emergency community needs or take advantage of unexpected opportunities for policy change.

Relationships with Grantees

Grantees deeply value their engagement with and access to the foundation's Programs staff. Grantees reported seeing their relationships with Cal Wellness as a partnership upon which they can draw from for help and resources when needed. These relationships have also opened doors to new opportunities, networks, and community connections that grantees deeply value. These long-term relationships, coupled with flexible, multi-year funding, enable grantees to uphold both ownership over their work and their own commitments to their community.

Using Cal Wellness' Voice and Platform

Grantees and peer funders report that Cal Wellness' voice plays a valuable role in influencing other philanthropies. Through its public stances and communications, and through its funding, Cal Wellness has elevated many varied facets of wellness, whether by funding grantees who work in environmental justice, providing and advocating for basic infrastructure in underserved communities, or developing employment pathways for racially diverse practitioners in the health care industry. When asked to select a non-grantmaking aspect of the foundation's work they valued most, more grantees (37%) selected its use of voice than any other aspect.

Responsiveness to External and Political Landscape

Cal Wellness has demonstrated strategic responsiveness by adjusting the Advancing Wellness portfolio and approach in response to external events, namely, the 2015 San Bernardino shooting and the 2016 election. In response to the San Bernardino shooting, Cal Wellness produced the #Enough! Summit to Prevent Gun Violence and drove the launch of the multi-funder collaborative, Hope and Heal: The Fund to End Gun Violence. Following the 2016 election, Cal Wellness launched Advance and Defend, an initiative that awarded \$16 million to address the threats and challenges posed to Californians by federal attacks on immigrants and attempts to undermine and roll back the Affordable Care Act.

This kind of strategic responsiveness is made possible by Programs staff, whom grantees rate highly on their ability to monitor relevant issues and trends. The vast majority of grantees (83%) ranked staff skills at monitoring and responding to emerging issues among the top three attributes they value about Cal Wellness' approach.

Key Recommendations

- Continue to provide flexible funding.
- Ensure Programs staff are adequately equipped to maintain a high level of engagement with grantees.
- Continue to leverage the Cal Wellness voice and platform to influence peers and amplify issues that matter to grantees.
- Support Cal Wellness staff to continue spotting emerging issues and trends and developing mechanisms for rapidly deploying resources.

DIVERSITY, EQUITY, AND INCLUSION: CORE STRATEGIES OF ADVANCING WELLNESS

How Cal Wellness Prioritizes Diversity, Equity, and Inclusion

Our analysis showed that Cal Wellness is leading peers in philanthropy on DEI metrics. Currently, 83% of its Advancing Wellness grants are reaching underserved communities, placing Cal Wellness among the top 20 foundations nationally in terms of grant dollars for underserved communities.² Additionally, over half (56%) of grants are going to organizations that (1) work for communities of color and (2) are led by people of color. Further, Cal Wellness equitably funds rural and urban communities across the state; on a per capita basis, funding is distributed proportionately.

These data points are useful for comparison and discussion, but they reflect a limited perspective on equity in Advancing Wellness' funding. Beyond these data points, we were not able to assess Cal Wellness' commitment to equity without a more explicit articulation of the disparities that Cal Wellness seeks to change between specific populations.

Key Recommendations

- Define the particular disparities you seek to address and set equity-related goals, beginning with discussion internally around the following questions:
 1. What is the well-being concern the foundation wishes to address?
 2. Which opportunities—i.e., assets, access, quality—most affect these well-being disparities?
 3. Who is advantaged or disadvantaged in relation to these opportunities?
 4. How will grantees and Cal Wellness increase fairness in opportunities?
- Continue to fund organizations that address systemic causes of inequities while also mitigating inequities' effects.
- Consider a more targeted use of an open LOI process.

² National Committee for Responsive Philanthropy. (2016). *Pennies for Progress: A Decade of Boom for Philanthropy, a Bust for Social Justice*. Author: Schlegel, R. Retrieved from: <https://bjn9t2lhlni2dhd5hvym7llj-wpengine.netdna-ssl.com/wp-content/uploads/2016/11/Pennies-for-Progress-highres.pdf>. Cal Wellness defines "underserved communities" as low-income people, people of color, immigrants, resilient youth, rural communities, and women and girls of color.

LOOKING AHEAD: THE NEXT FIVE YEARS OF ADVANCING WELLNESS

Our data collection and analyses also surfaced findings to inform potential adaptations to the Advancing Wellness approach in the next five years.

Recommendation: Leverage Opportunities for Cross-Grantee Engagement

We found outcomes related to the ways in which grantees work synergistically with one another—sometimes unknowingly. First, the Advancing Wellness portfolios include grantees whose work complements one another. When we brought grantees together for our data collection efforts, grantees themselves observed this complementarity, despite many having been previously unaware of one another’s Cal Wellness–supported efforts. Grantees were surprised by the variety of issues Cal Wellness funds, as well as by the interconnectedness among their different sectors and spheres of work. A few discovered potential cooperative efforts or partnerships they could envision in the future.

Second, there are important, mutual feedback loops between those delivering direct services and those doing policy advocacy work. These respective foci mutually reinforce one another, as services directly fulfill needs created by governance gaps, while the gaps themselves are tackled in a more sustained way through policy improvements. Underlying this approach is a theory that many grantees agree with—mitigating the effects of systemic injustice is just as important as addressing the conditions that produce it. Organizing work at the “portfolio” level, rather than by program issue area, may support this kind of grantmaking.

Recommendation: Continue Working Across Issues and Intersecting Inequities

We spoke with influential peer funders and other experts about their perspectives on the most pressing wellness-affecting issues for Californians in the next five years. The following rose to the surface across these perspectives:

- Rising economic inequality in California
- Effects of climate change on community wellness
- The importance of—and threats to—immigrant communities

These issues will continue to influence the health and wellness of Californians in different ways during the second half of Advancing Wellness. We therefore recommend the foundation continue to consider their intersections with health and wellness, both internally and with grantees, and adapt Advancing Wellness as needed to address such intersections.

CONCLUSION

Cal Wellness was able to adapt and pivot alongside its grantees *because* Advancing Wellness was not designed to be overly rigid or directive. As a result, hundreds of vital, community-oriented nonprofits and thousands, if not millions, of individual Californians benefited through increased access to services and opportunities, the effects of legal and policy changes, and shifting social norms to support community wellness.

The second five years of Advancing Wellness are likely to continue to see this level of political instability. Thus, maintaining the flexibility and responsiveness of the Advancing Wellness strategy will be critical.

In sum, this assessment finds that Cal Wellness has met and often exceeded its own aspirations for Advancing Wellness. Our final recommendation is that, in considering this report, the foundation prioritize strengthening what’s already working well and putting additional energy into those areas that show promise of even greater impact—centering equity; supporting grantees to self-organize and collaborate; and selecting grantees who rely on, embody, and encourage community-driven change.